Commonwealth of Massachusetts Executive Office of Health and Human Services

Virtual Gateway



SHORE Version 7.0 Enhancements May, 2008



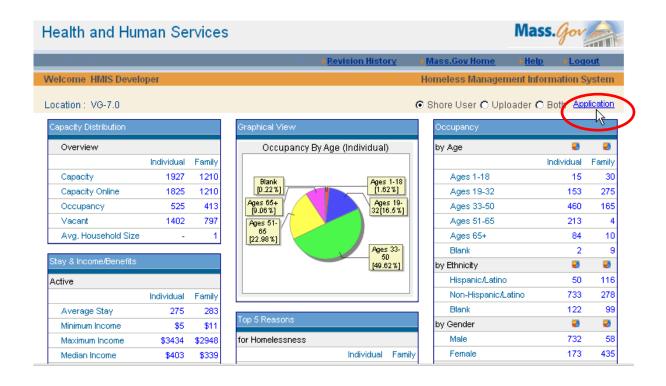
SHORE Version 7.0 Enhancements May, 2008

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Provider Supervisor & Technical Specialist - Roles ViewLog In

A new page will display in Version 7.0 of SHORE for users that have Provider Supervisor or Technical Specialist roles. This new page provides real-time aggregate information on your programs. This feature benefits the entire homeless community as it provides real-time statewide and continuum level aggregate data on a need-to-know basis. **To get to the client look-up screen, click the application link in the upper right hand corner:**



To return to the dashboard, follow the <u>dashboard</u> link in the left navigation panel.



Client Lookup

Add a New Client Two new fields have been added when you register a new homeless individual (Figure 1):

- * Veteran
- * Disabling Condition

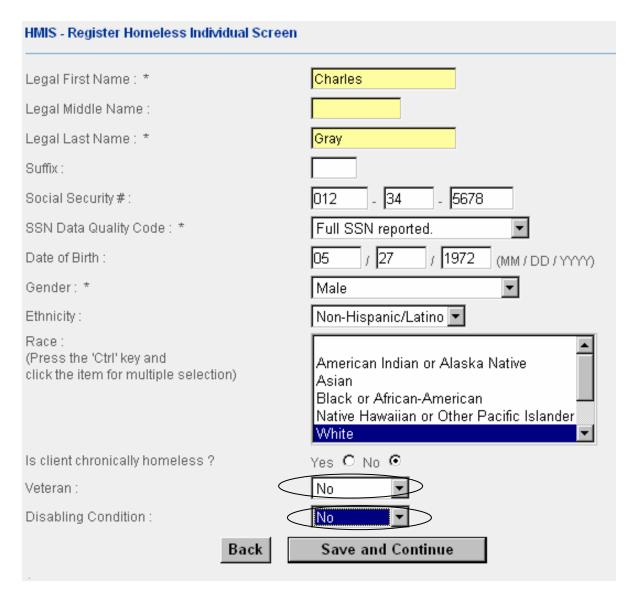


Figure 1: New Client fields



Client Activity Information screen

Basic client information is now summarized at the top of the Client Activity Information screen (Figure 2):



Figure 2: Client Activity Information screen



Client Actions

Program Entry

On the first page of program entry (Figure 3), a new field has been added:

* Homelessness Status at Enrollment

Also, basic information is summarized at the top of each screen.

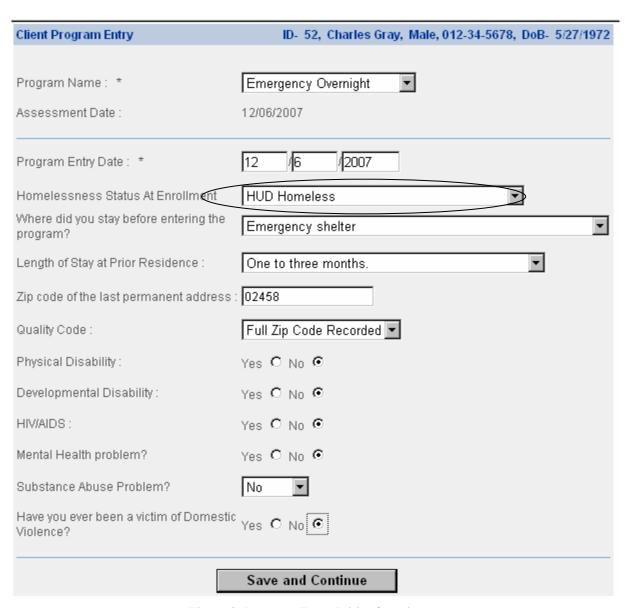


Figure 3: Program Entry Initial Questions



Program Actions

Program Actions:

New program actions include:

* Add HUD Services and

* Copy Program Data

Also, Service Maintenance has been enhanced.

Add HUD Services Providers may wish to track the standard HUD Services provided to their clients within the context of their program offerings.

The Add HUD Service feature under the Program Action menu is the tool used to record standard HUD Services provided to clients.

Add HUD Service Steps To record a standard HUD Service provided to a client:

Steps	Action
1	Use Client Lookup or click Profile to get to the Client Activity Information Page.
2	Select a Program to which the Service will be added by clicking once on the radio button next to the correct Program name.
3	Select Add HUD Services from the Program Action drop-down menu. Click Submit (Figure 4).
4	Select the appropriate Service information by clicking in the check box next to the appropriate field(s). Please note that the End Date, Internal and Quantity fields are optional, but the Service Start Date is required (Figure 5). Click Save. To view a previously entered Service, click once on the + sign next to the Program name on the Client Activity Information Page

Continued on next page...





Figure 4: Add HUD Services option



Figure 5: Add HUD Services screen



Editing/Deleting a Service Entry

To review or edit a Service entry click once on the name of the <u>Service</u>, which is a hyperlink (Figure 6). (You may first have to click on the + sign to access the **Service** information.)

To delete a Service entry, select the **Mark Deleted** check box (Figure 7) and select **Save.**

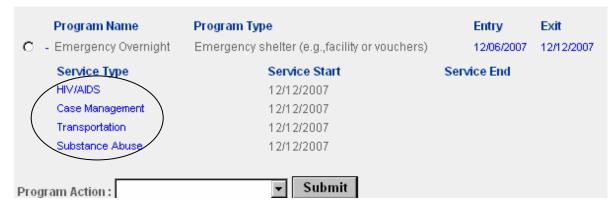


Figure 6: Service display

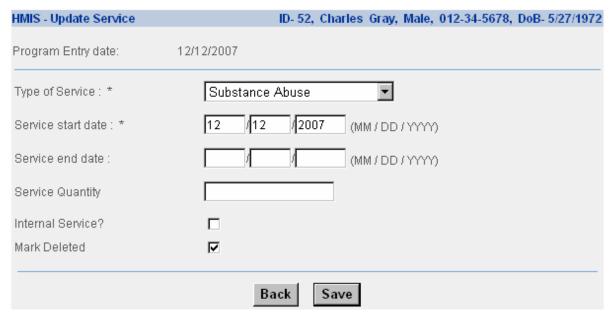


Figure 7: Update Service screen



Service Maintenance

Providers may wish to track the other Services provided to their clients within the context of their program offerings.

The Service Maintenance feature under the Program Action menu is the tool used to record Services provided to clients not listed in the Add HUD Services section.

Service Maintenance Steps

To record a non-HUD Service provided to a client:

Steps	Action
1	Use Client Lookup or click Profile to get to the Client Activity Information Page.
2	Select a Program to which the Service will be added by clicking once on the radio button next to the correct Program name.
3	Select Service Maintenance from the Program Action dropdown menu. Click Submit (Figure 8).
4	Enter the Service information in the appropriate fields. Please note that the end date is optional, but the Service Start Date and Type of Service are required (Figure 9). Click Save.
	To view a previously entered Service, click once on the + sign next to the Program name on the Client Activity Information Page

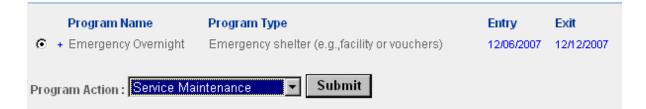


Figure 8: Service Maintenance Option

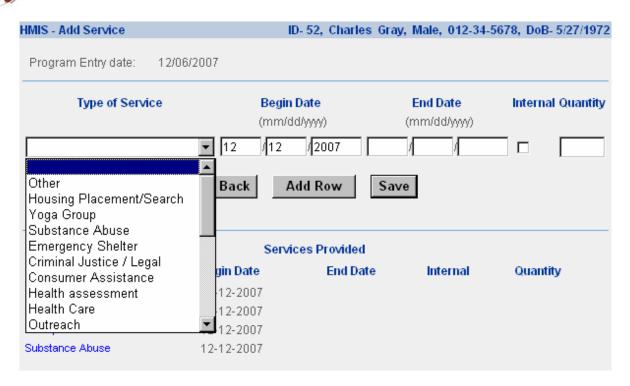


Figure 9: Service Maintenance Screen



Copy Program Data If a client enters a new program which shares the same information as a previously entered program, the previously entered program information can be copied (as opposed to manually entering that information a second time).

Copy Program Data Steps

To copy a Program:

Steps	Action
1	Click on Profile or use Client Lookup to go to the Client Activity Information screen (Error! Reference source not found.).
2	Select Copy Program Data from the Program Action dropdown menu. Click Submit (Figure 10).
3	Select the program to copy the information to (Figure 11).
4	Select Copy Program.

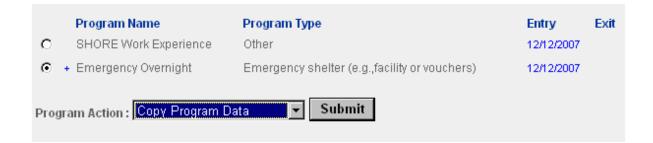


Figure 10: Copy Program Data option

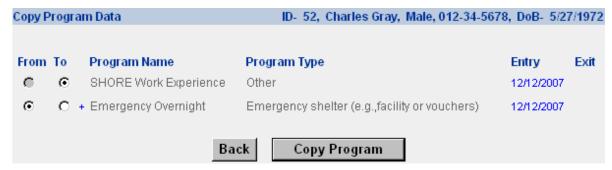


Figure 11: Copy Program Data screen



Assessment Tool

Introduction

The Assessment Tool shortcut is located in the Client Services menu (on the left side of the screen). The Assessment Tool allows the user to assess the client in seventeen important domains at various times, to add action steps specific to that domain and to review the case history of assessments and action steps.



The following pages will demonstrate each of the Assessment Tool.

Create an Assessment

To create an assessment:

Steps	Action
1	Use Client Lookup or click on Profile to get to the Client Activity Information Page.
2	Select the Assessment Tool hyperlink on the left.
3	Select Assess at the bottom of the screen (Figure 12).
4	In the Assessment Tool screen (Figure 13), select the reasons for homelessness (primary and secondary).
5	Select the appropriate current functioning level (In Crisis, Vulnerable, Safe, etc.) of the desired domain (Income, Employment, Housing, etc.) for this assessment.
	Note: a description of the functioning level appears when you hold the mouse over the associated domain (e.g. "No income" describes what it means to be In Crisis relative to Income.)
6	Select Save when the desired levels for each domain have been completed.



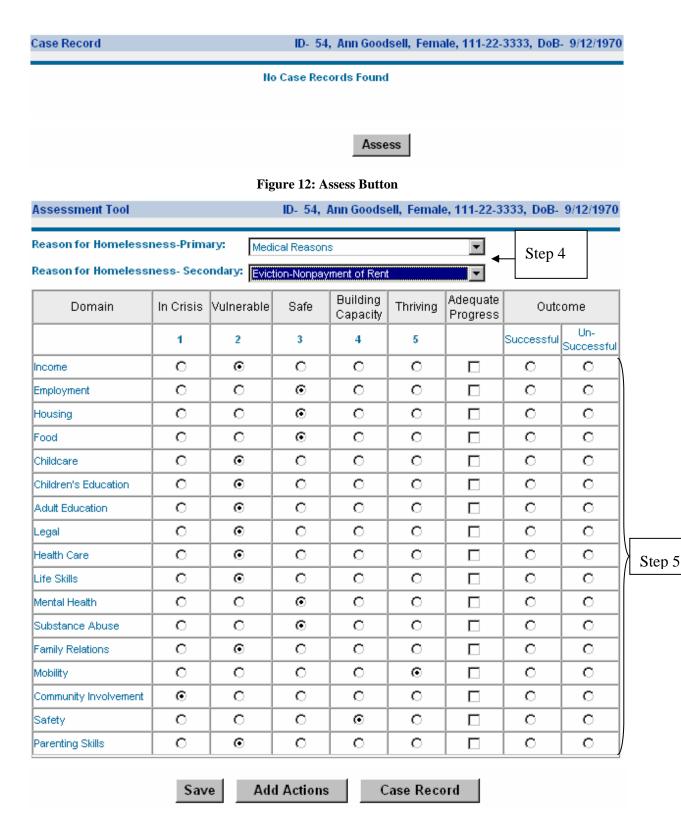


Figure 13: Assessment Tool screen



Display a Case Record

To display a Case Record:

Steps	Action
1	Use Client Lookup or click on Profile to get to the Client Activity Information Page.
2	Select the Assessment Tool hyperlink on the left.
3	In the Case Record screen (Figure 14), a history of initial and current assessments is documented along with information on action steps.
4	To add an assessment, select Assess and follow the steps under Create an Assessment (page 12).



				_			
Reason for Homelessne		dical Reas			essed By:	hmisdevel	
Reason for Homelessne	_			tofRent Last	Assessed B		•
Domain	Adequate Progress Unenroll	Assess Initial Co		Action Steps	Start Date	Completion Date	Notes for ActionSteps
Income	П	2	3	Job Seeking	01/02/2008	01/12/2088	Actively looking
Employment		3	2				
Housing	П	3	4	Housing Searc	h 12/27/2007		
Food		3	1				
Childcare	П	2	3				
Children's Education	П	2	1				
Adult Education	П	2	3				
Legal	П	2	1				
Health Care	П	2	3				
Life Skills	П	2	3				
Mental Health	П	3	3				
Substance Abuse	П	3	3				
Family Relations	П	2	2				
Mobility	П	5	5				
Community Involvement	· -	1	1				
Safety	П	4	4				
Parenting Skills	П	2	2				

Figure 14: Case Record screen



Add an Action

To add an action:

Steps	Action
1	Use Client Lookup or click on Profile to get to the Client Activity Information Page.
2	Select the Assessment Tool hyperlink on the left.
3	In the Case Record screen (Figure 14), a history of initial and current assessments is documented along with information on action steps.
4	To add an action, select Assess and then Add Actions from the Assessment Tool screen (Figure 15).
5	Complete the fields in the Add Actions screen (Figure 16).
6	Select Save.



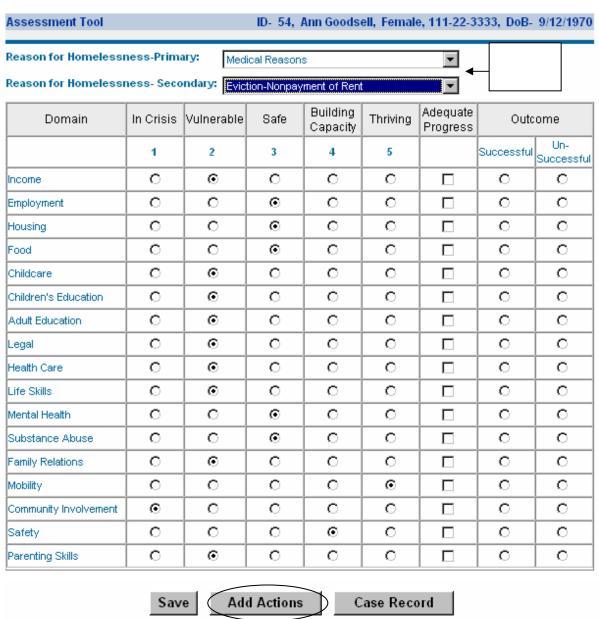


Figure 15: Assessment Tool screen



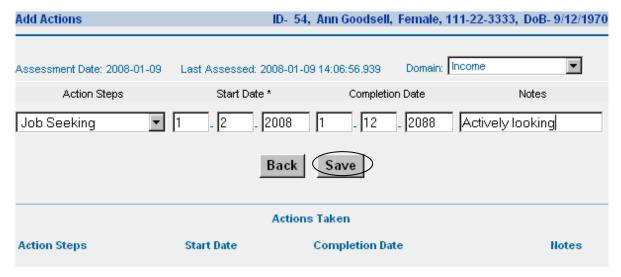


Figure 16: Add Actions screen